Santrax Electronic Visit Verification
Fixed Visit Verification Device
Provider Visit Maintenance and Report Training

01/30/14

Agenda

- ➔ Introduction
- – Fixed Visit Verification (FVV) Calls in Santrax Visit Maintenance
- – Running FVV Reports

This training presentation is for Electronic Visit Verification (EVV) FVV only. Additional EVV training materials can be accessed via the DADS EVV website at http://www.dads.state.tx.us/evv/training.html

What you will learn

- How to identify FVV Device calls in Santrax Visit Maintenance.
- How to identify the call times and visit verification numbers in Santrax Visit Maintenance.
- How to run FVV Device reports in Santrax.

Agenda

- Introduction
- ➔ FVV Calls in Santrax Visit Maintenance
- Running Reports

Benefits of FVV

- The FVV Device is used to capture in and out times of the attendant when a landline home telephone is not available for use.
- When used correctly, visit maintenance should not be required to document FVV visits.
- To limit time and effort for visit maintenance providers should ensure all staff follow the FVV process.

What to expect in Santrax Visit Maintenance

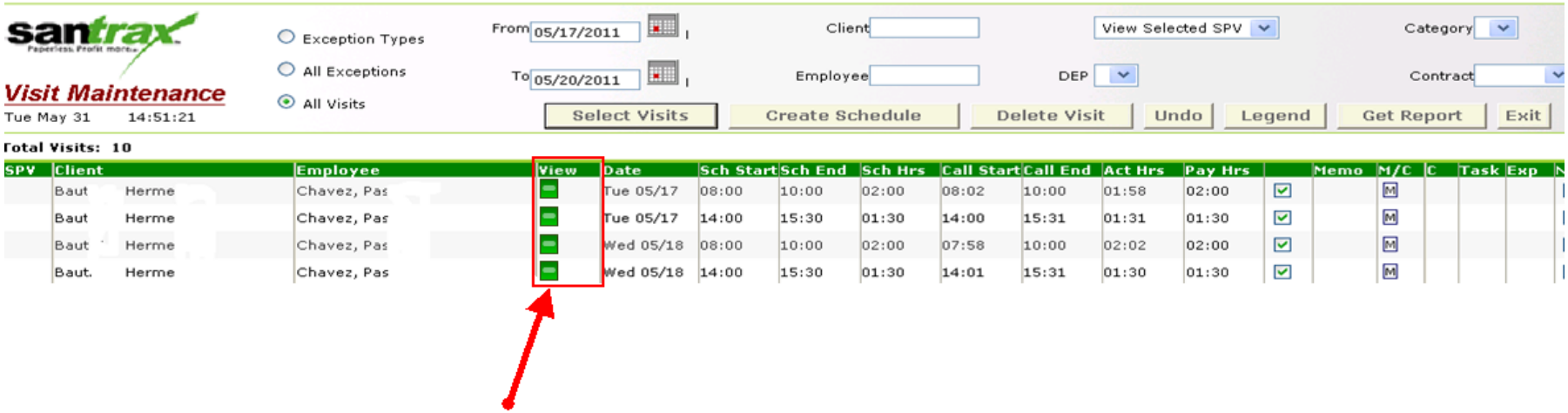
During the FVV call process, errors can occur. These errors are corrected using Visit Maintenance.

- The Santrax Visit Maintenance module allows for editing visit information by designated users. This is covered in detail in the Santrax user manual via the DADS EVV site at http://www.dads.state.tx.us/evv/training.html

- NOTE: It is important to review Visit Maintenance on a daily basis. If corrections need to be made, Sandata recommends waiting until the following day.

What to Expect in Santrax Visit Maintenance

When a Santrax call is received in which an FVV value has been entered, an FVV icon is displayed in the view column in Santrax Visit Maintenance. This icon appears as a green box with a light green button icon inside.


santrax
Visit Maintenance
Tue May 31 14:51:21
Exception Types
All Exceptions
All Visits
From 05/17/2011
To 05/20/2011
Client
Employee
View Selected SPV
DEP
Category
Contract
Select Visits
Create Schedule
Delete Visit
Undo
Legend
Get Report
Exit
Total Visits: 10
SPV Client Employee View Date Sch Start Sch End Sch Hrs Call Start Call End Act Hrs Pay Hrs Memo M/C C Task Exp
Baut Herme Chavez, Pas Tue 05/17 08:00 10:00 02:00 08:02 10:00 01:58 02:00
Baut Herme Chavez, Pas Tue 05/17 14:00 15:30 01:30 14:00 15:31 01:31 01:30
Baut Herme Chavez, Pas Wed 05/18 08:00 10:00 02:00 07:58 10:00 02:02 02:00
Baut. Herme Chavez, Pas Wed 05/18 14:00 15:30 01:30 14:01 15:31 01:30 01:30

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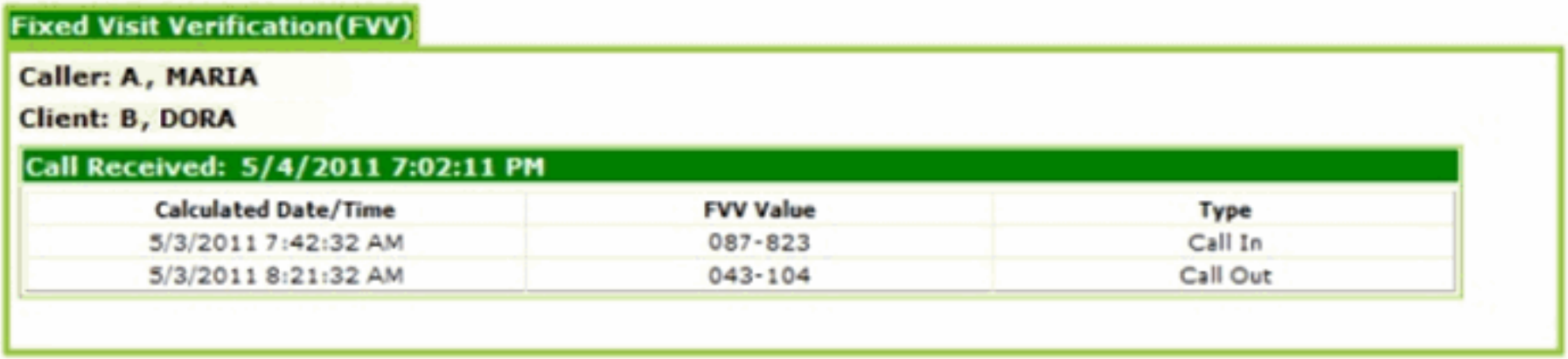
What to expect in Santrax Visit Maintenance

If an FVV icon is clicked, a description of the call will appear in a pop up. It includes:

- The first and second visit verification numbers (FVV Values).
- The *call in* time and *call out* time.
- The Caller and Client/Individual associated with the call.
- Any interim calls (calls that occurred between the call in and the final call out).



Fixed Visit Verification(FVV)

Caller: A., MARIA

Client: B, DORA

Call Received: 5/4/2011 7:02:11 PM

Calculated Date/Time	FVV Value	Type
5/3/2011 7:42:32 AM	087-823	Call In
5/3/2011 8:21:32 AM	043-104	Call Out

FVV Visit Maintenance Process

If FVV Device visits have missing data or there are errors in the data, the provider will need to fill in the missing data or make corrections using Visit Maintenance. This is the same process that is used for missing or incorrect data in landline home telephone calls.

Examples of missing or errors in data include:

- Client ID is entered incorrectly.
- Employee ID is entered incorrectly.
- Multiple FVV calls
- Client ID and Employee ID are both entered incorrectly.
- FVV Device In or Out values are entered incorrectly.

How to Conduct Visit Maintenance with FVV

- Review Visit Maintenance on a daily basis to view and correct any exceptions. Sandata recommends waiting until the following day to make corrections to ensure complete information is in the EVV system.

FVV Call-Invalid Employee ID

When a call is placed to Santrax, the attendant will hear the following prompt:

"Welcome, please enter your Santrax ID."

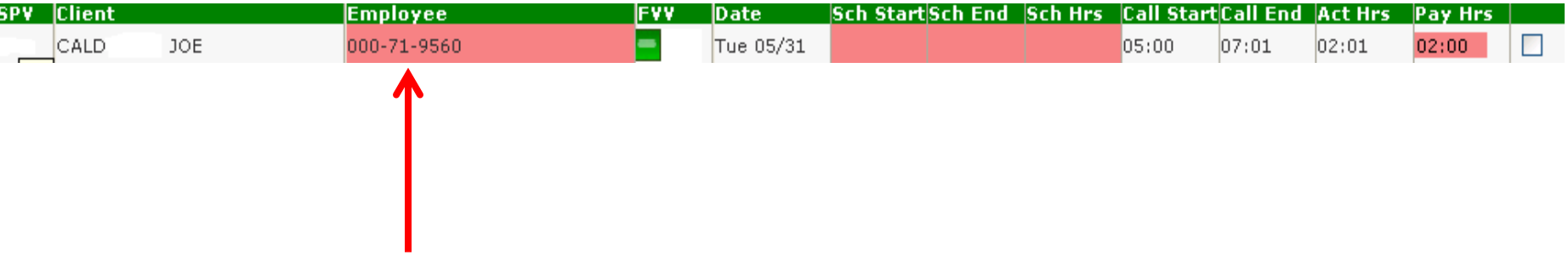
If the Santrax ID is entered incorrectly the attendant will hear the standard response as if the Santrax ID had been entered correctly:

"Received at (TIME). Press the star (*) key to enter Visit Verification numbers or pound (#) to continue."

Furthermore, this call will be flagged in red as an unknown employee exception in Visit Maintenance.

If the attendant continues with the correct client ID for the individual being serviced and correct FVV values, the FVV icon will display in Visit Maintenance.

Visit Maintenance- Invalid Employee ID



SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs	
	CALD JOE	000-71-9560		Tue 05/31				05:00	07:01	02:01	02:00	

In this example, a call was made to enter FVV values but the attendant entered an incorrect Santrax ID. Once this unknown attendant is identified and corrected, this visit will then match up with the original scheduled visit line and Reason Code 02 for Invalid ID-PCA Verified should be selected.

FVV Call-Invalid Client ID

In the FVV call process, after pressing the star (*) key to indicate an FVV call, the attendant will be prompted to enter the Client's ID.

"Please enter first Client ID."

If the Client ID is entered incorrectly, the attendant will hear the following prompt:

"No FVV registered, please re-enter the Client ID or press the pound key to continue."

- The attendant should re-enter the correct Client ID, and will be prompted to continue the FVV call.

- If the Client ID is not accepted after repeated attempts, the attendant should hang up, contact their agency for the correct Client ID and try the call again.

Visit Maintenance- Unknown/Invalid Client ID

This is an example of an incorrect Client ID FVV call in Visit Maintenance. The attempted call will appear as an unknown client exception with no FVV icon displayed. If the attendant followed the proper procedure for correcting the invalid Client ID by calling the provider for the correct client ID and retrying the call, a secondary visit with correct information will appear in Visit Maintenance.

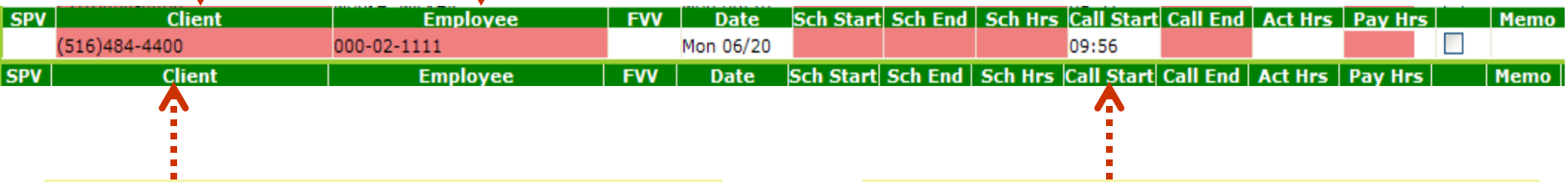
If the attendant did not follow proper procedure, the provider should work with the attendant to determine the reason for the unknown client and resolve by updating the Client ID and adjusting pay hours accordingly. Use the appropriate memo code(s) to document the reason for the correction. Providers should note actual hours worked in the free text field, for example 08:09AM – 08:34AM.

SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C
	(516)484-4400	Mouse, Mickey		Mon 06/20				09:52				☐		M
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C

When the Client ID is entered incorrectly, or not at all, the time of the call (not the time of the visit) appears in Call Start.

Visit Maintenance- Unknown Client and Employee

In this example, both the client and employee are unknown. The provider should determine which attendant placed the call and work with the attendant to determine the reason for the unknown client/employee and resolve accordingly, and then correct the unknown client/employee and adjust pay hours. Use the appropriate memo code(s) to document the reason for the correction.



SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo
	(516)484-4400	000-02-1111		Mon 06/20				09:56				☐	

SPV Client Employee FVV Date Sch Start Sch End Sch Hrs Call Start Call End Act Hrs Pay Hrs Memo

The number displayed in the Client field is the number from which the call was placed. This number may or may not be associated with the attendant.

When the Client ID is entered incorrectly, or not at all, the time of the call (not the time of the visit) appears in Call Start.

Visit Maintenance- Multiple FVV Calls

If FVV values were entered for the same visit on different calls, Santrax will apply visit matching rules to automatically associate the FVV values with the correct visit. No visit maintenance is required. If the matching rules do not determine a match, you will need to resolve any missing or unmatched call information in Visit Maintenance.

****NOTE:** Attendants should try to avoid making more than one call to enter FVV values.

FVV Call- Incorrect FVV Values

- In the FVV call process, after entering the Client ID correctly, the attendant will be prompted to enter the first FVV number: ***"Enter the first visit verification number."*** *This is the first number obtained from the FVV Device when the attendant arrived at the individual's home and will represent the time in.*
- If the FVV number is entered incorrectly, the attendant will hear the following prompt: ***"Invalid visit verification number, please try again."***
- The attendant should re-enter the correct FVV number, and they will be prompted to continue the FVV call.
- If the attendant does not successfully enter the correct FVV Number, they should hang up and contact their agency to correct the visit using Visit Maintenance.

Visit Maintenance- Missing Call Out

SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo
	Clooney, George	Rubble, Barney		Mon 06/20	12:00	12:25	00:25	10:09				☐	
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo

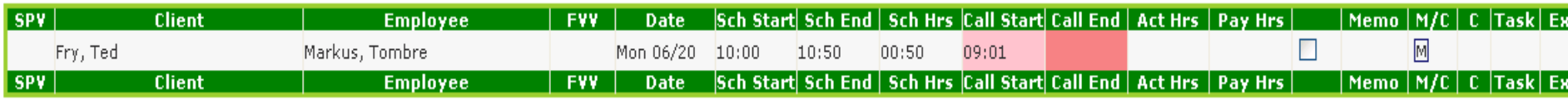
When a call was made to enter FVV values but the attendant entered the second FVV value incorrectly, the Call End time is not recognized as valid and now the pay hours must be manually entered. Memo Code 06 for Attendant failed to call in/out, individual verified attendant worked hours as entered should be selected. Providers should note actual hours worked in the free text field, for example 10:09AM – 10:34AM.

FVV Call- No FVV Values Input

- In the FVV call process, after entering the Client ID correctly, the attendant will be prompted to enter the first FVV number: ***"Enter the first visit verification number."*** *This is the first number obtained from the FVV Device when the attendant arrived at the individual's home and will represent their time in.*
- If the attendant does not enter both FVV numbers, they will hear the following prompt: ***"You have not entered any visit verification numbers, press 1 to return or press the # key to continue."***
- The attendant should enter the FVV numbers if known, and they will be prompted to continue the FVV call.
- If the attendant does not know or has not successfully entered the FVV numbers, they should hang up and contact their agency to correct the visit using Visit Maintenance.

Visit Maintenance- No FVV Values Input

When a call was made to enter FVV values but the attendant did not enter any values, the Call Start time will be clearly flagged in pink to indicate the call did not originate from the individual's home phone and there will be no FVV symbol on the visit line. This exception is referred to as an Unmatched Client Phone/ID. The agency should work with the attendant to determine the reason for the missing FVV values and resolve in Visit Maintenance by adjusting pay hours accordingly. Use the appropriate memo code(s) to document the reason for the correction. Providers should note actual hours worked in the free text field, for example 10:05AM – 10:55AM.



SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C	C	Task	Ex
	Fry, Ted	Markus, Tombre		Mon 06/20	10:00	10:50	00:50	09:01				☐		M			
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C	C	Task	Ex

When the FVV values are not entered at the time of the call, the time of the call (not the time of the visit) appears in Call Start

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Missing FVV Device Data - Correcting Pay Hours: 3 Ways

There are three ways to adjust the Pay hours in Visit Maintenance.

- If the Pay hours should equal the scheduled hours, click on the check box next to the Pay column.
- If the Pay hours are different than the scheduled hours, click once on the Pay Hrs box and type the desired hours.* (If less than 10 hours, enter a zero first).
- To accept the Pay hours shown, simply double click on the pay box.

Remember to add a Memo Code to give the reason for the correction.

*Manually corrected hours will appear **bolded.**

Agenda

- Introduction
- FVV Calls in Santrax Visit Maintenance
- ➔ Running FVV Reports

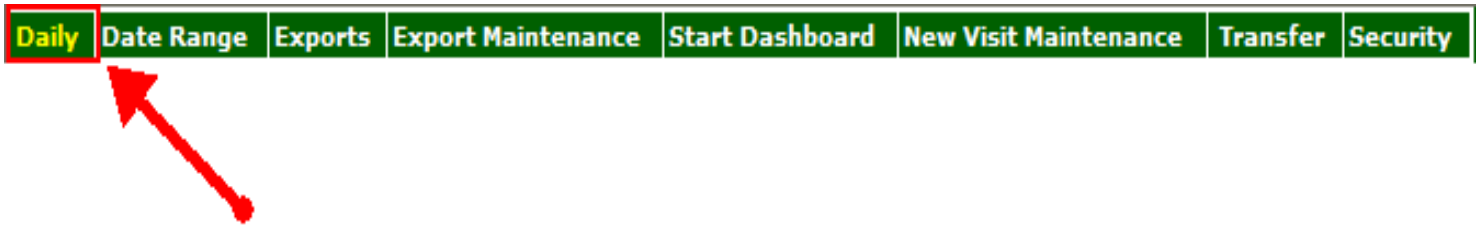
FVV Related Reports

The reports related to FVV and a description of the content for each report:

- **FVV Assignment Report**: Displays the client, the FVV Device serial numbers and the date and time they were registered.
- **FVV Call Listing Report:** Displays client and employee information for all calls made using FVV values.
- **FVV Registrations Report**: Displays the serial number, client information, registration date and deactivation date for a date range.

Running the FVV Assignment Report - Step 1

Step 1: To view the FVV Assignment Report, select **Daily** from the green menu bar at the top of the page.

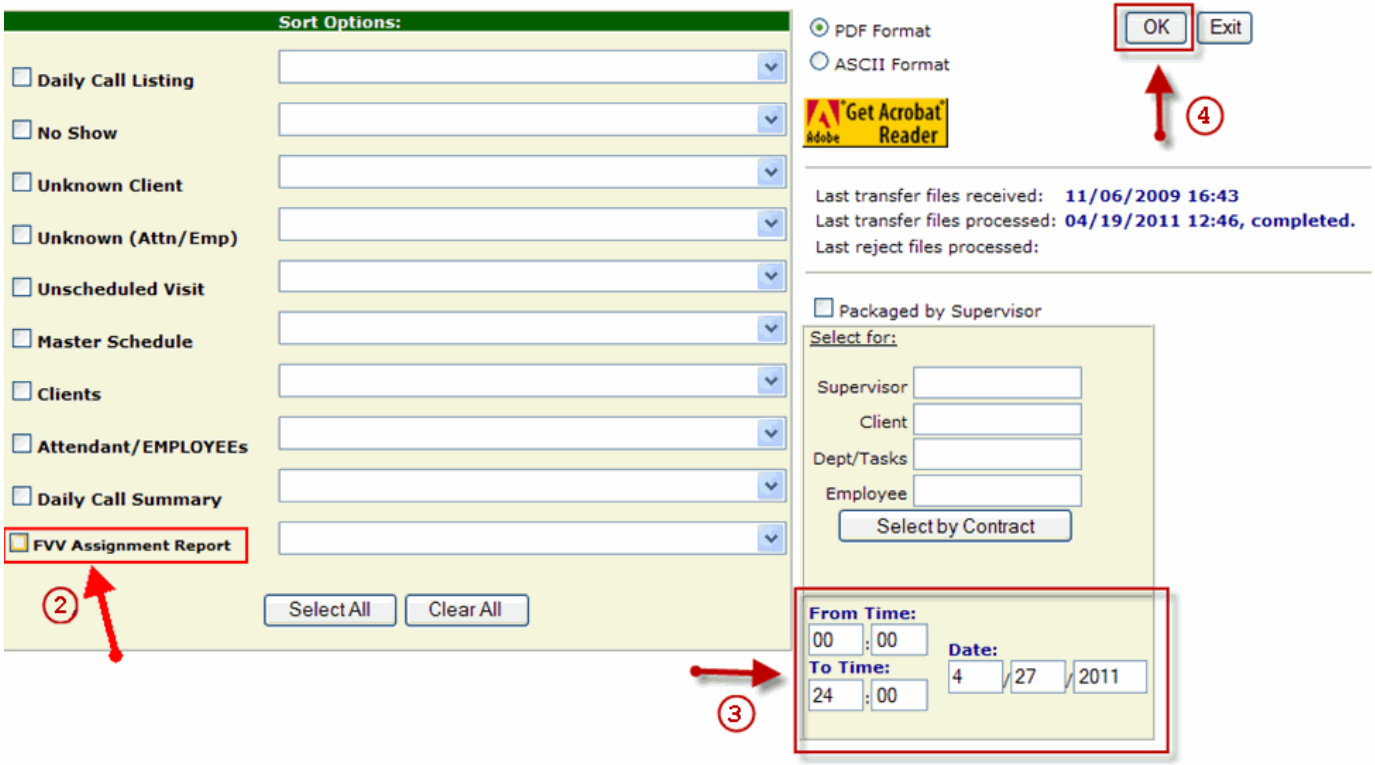


Running the FVV Assignment Report - Steps 2, 3, and 4

Step 2: Check the box next to the FVV Assignment Report.

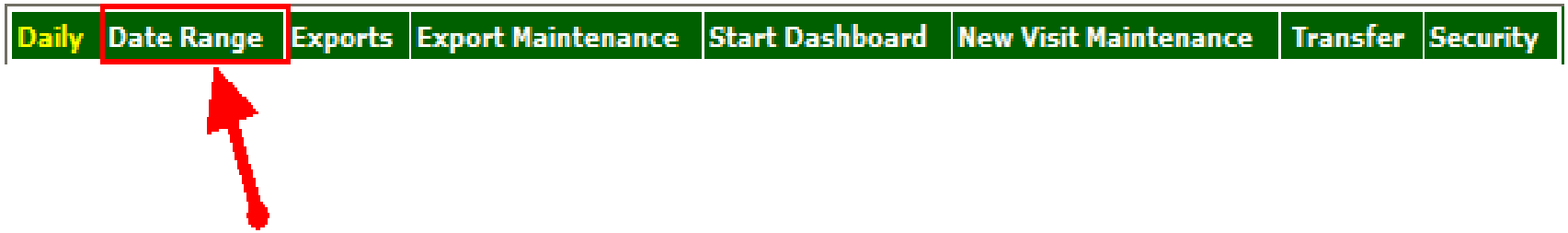
Step 3: Choose the time range and date range for the report.

Step 4: Then select **OK** to view the report.



Running the FVV Call Listing Report - Step 1

Step 1: To view the FVV Call Listing Report select **Date Range** from the green menu bar at the top of the page.

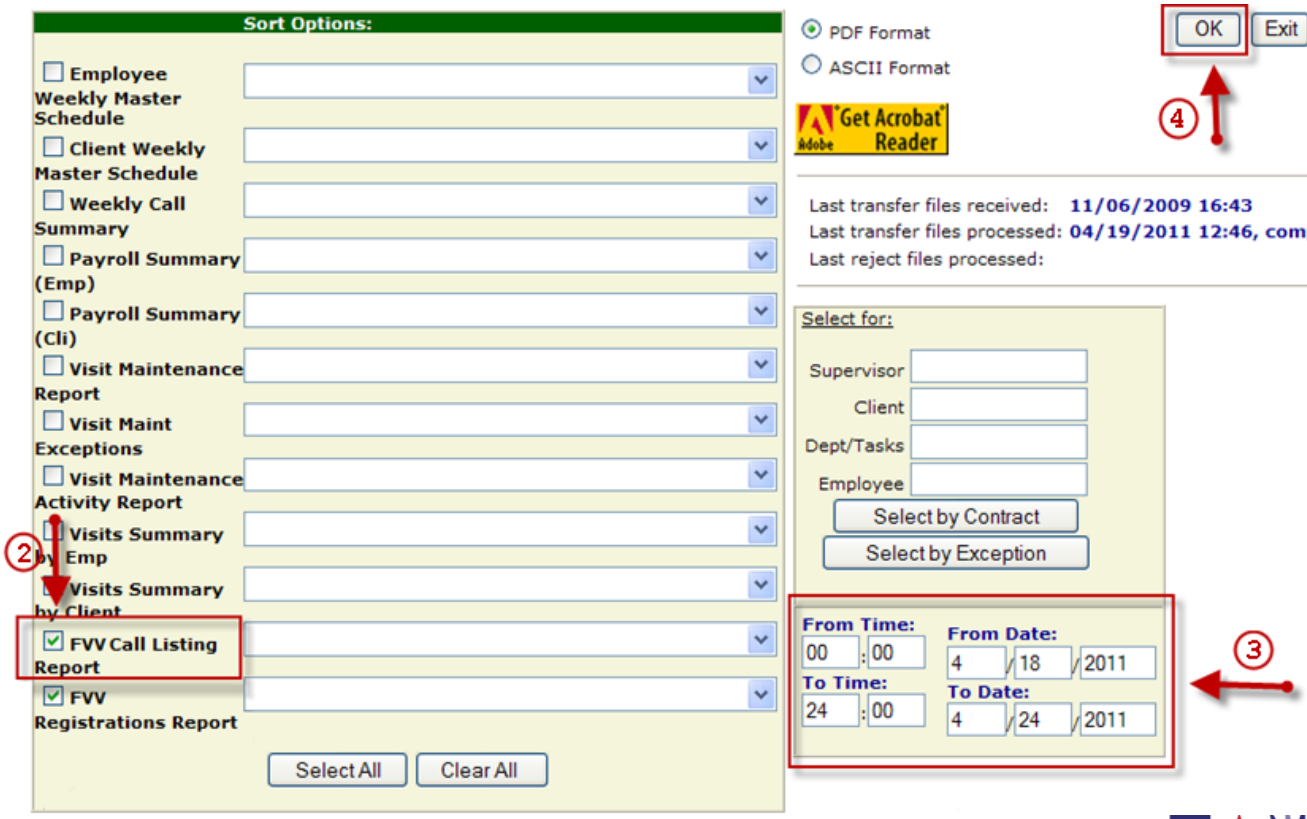


Running the FVV Call Listing Report - Steps 2, 3, and 4

Step 2: Select the check box next to FVV Call Listing Report

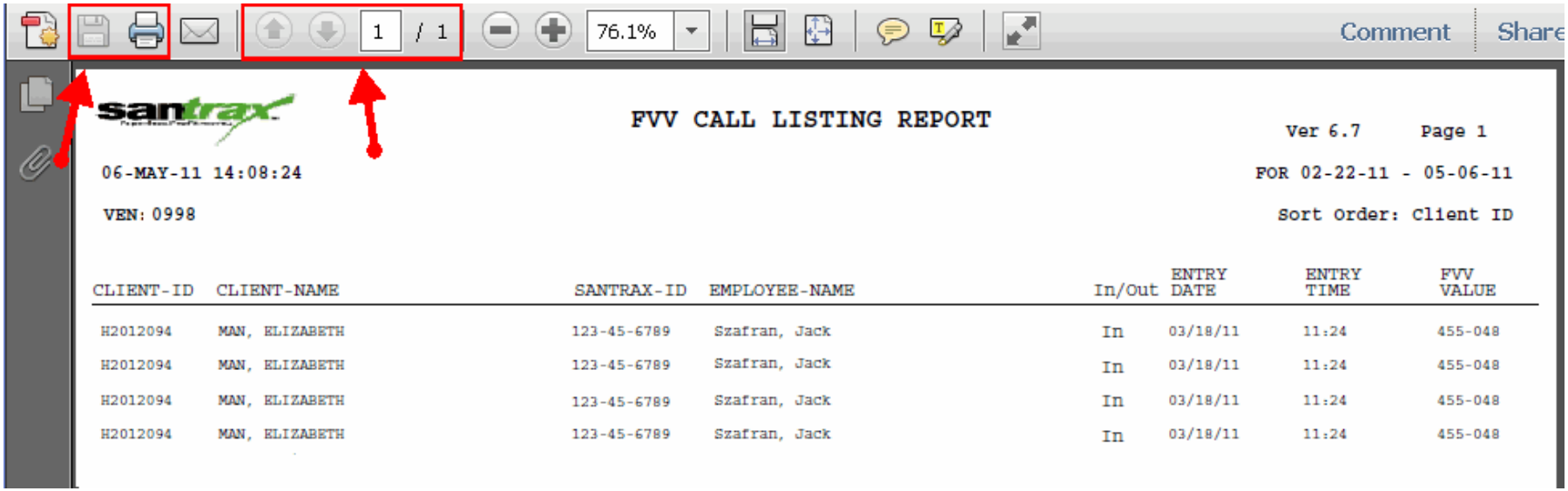
Step 3: Select the time and date range.

Step 4: Select **OK** to view the FVV Call Listing Report.



Viewing the FVV Call Listing Report

- The report will appear in PDF format, which can be printed or saved to your computer.
- Select the arrows to scroll through the pages.


1 / 1
76.1%
Comment
Share
santrax
FVV CALL LISTING REPORT
Ver 6.7 Page 1
06-MAY-11 14:08:24
FOR 02-22-11 - 05-06-11
VEN: 0998
Sort Order: Client ID
CLIENT-ID CLIENT-NAME SANTRAX-ID EMPLOYEE-NAME In/Out ENTRY DATE ENTRY TIME FVV VALUE
H2012094 MAN, ELIZABETH 123-45-6789 Szafran, Jack In 03/18/11 11:24 455-048
H2012094 MAN, ELIZABETH 123-45-6789 Szafran, Jack In 03/18/11 11:24 455-048
H2012094 MAN, ELIZABETH 123-45-6789 Szafran, Jack In 03/18/11 11:24 455-048
H2012094 MAN, ELIZABETH 123-45-6789 Szafran, Jack In 03/18/11 11:24 455-048

Running the FVV Registrations Report - Step 1

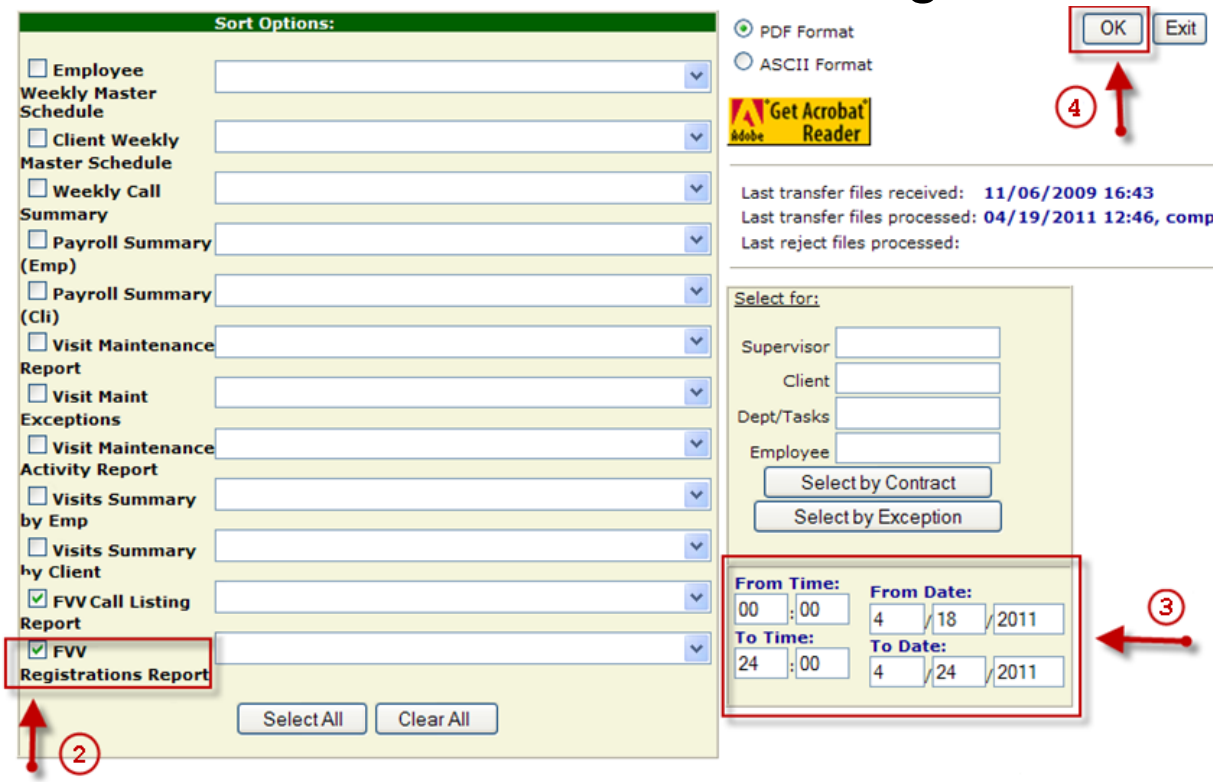
Step 1: To view the FVV Registrations Report select **Date Range** from the green menu bar at the top of the page.

Running the FVV Registrations Report - Steps 2, 3, and 4

Step 2: Select the check box next to FVV Registrations Report.

Step 3: Select the time and date range.

Step 4: Select **OK** to view the FVV Registrations Report.



Viewing the FVV Registrations Report

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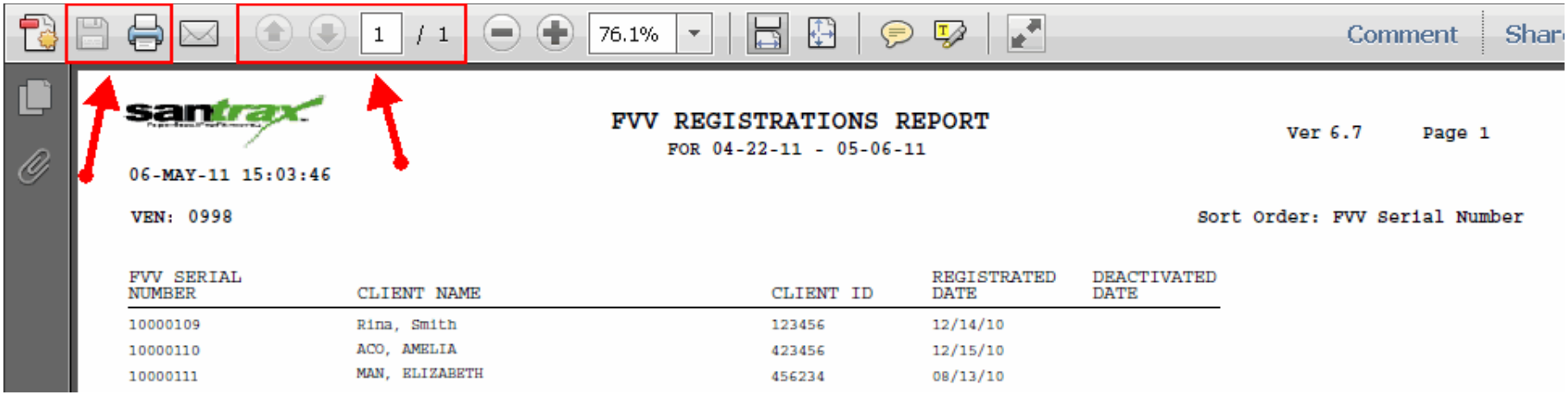
- Select the arrows to scroll through the pages.



What you have learned

In this presentation you have learned:

- How to view FVV calls in Santrax Visit Maintenance.
- How to review FVV Visit Maintenance.
- The purpose of FVV Related Reports.
- How to run and review FVV reports in Santrax.

Should you have any questions contact Sandata at (855) 781-2079.

FVV Training Access

For additional FVV training, please access the additional training modules:

FVV Overview Request Training (Provider): Overview and request process.

FVV Install Call Training (Provider): FVV Device installation and call process.